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Date: 9/10/2001

GAIN Report #TU1036

# Turkey

## Oilseeds and Products

### Soybean and Products Update

### 2001

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#### **Report Highlights:**

**Turkish soybean production will increase during MY2001, but is still far from meeting domestic demand. Soybean imports continued to grow and are estimated at 370,000 MT for MY2000, while soybean meal imports are estimated at 450,000 MT. The United States continues to be Turkey's major supplier for both soybeans and soybean meal.**

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Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
Unscheduled Report  
Ankara[TU1], TU

Turkish soybean production is estimated to have increased to 55,000 MT in MY2001. Despite an increase of over thirty five percent compared to the previous year, domestic production will only meet about eleven percent of consumption. Increased production is the result of Government of Turkey (GOT) efforts to increase domestic oilseed production through production bonus programs. Last year, the GOT provided soybean growers with an eight cents per kilogram bonus for soybeans, and is expected to do this again this year. Soybean consumption would have been higher, but the country is still in an economic recession, which slowed the growth of the poultry industry and dashed hopes for imminent revitalization of the livestock sector.

Soybean imports are increasing and should reach about 370,000MT by the end of MY2000. According to GOT import data, the U.S. had an 85% share of the Turkish soybean import market during the first 8 months of the year. Our projection for soybean meal imports increased from previous estimates, but still falls short of last year's level, reflecting a trend to use more full fat soya in feeds. The U.S. share of the soybean meal market during the first eight months of the year was about 55%.

The P,S,&D and trade data in our report is based on Turkish Customs Data. **Trade table data for MY 2000 reflects the partial year September 2000- May 2001.** U.S. Export Sales Reports indicate that the United States exported 346,000 MT soybeans to Turkey in MY 2001, compared to 249,000 in MY2000. Based on the same source, U.S. exports of soybean meal to Turkey reached 292,000 MT in the first eleven months of MY 2001, compared to 283,000 in the corresponding period of MY2000.

Soy oil imports are estimated lower than last year at around 100,000MT due to a decline in margarine production and exports which decreased to 73,897 MT during CY2000 compared to 90,825MT during CY1999. The drop is due to competition from other producers and high local import duties of oils and fats.

PSD Table						
Country	Turkey					
Commodity	Oilseed, Soybean				(1000 HA)(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		09/1999		09/2000		09/2001
Area Planted	0	0	0	0	0	0
Area Harvested	28	28	18	30	20	20
Beginning Stocks	30	30	40	40	20	50
Production	60	60	40	40	55	55
MY Imports	313	313	310	370	330	395
MY Imp. from U.S.	240	240	280	320	250	340
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	403	403	390	450	405	500
MY Exports	0	0	0	0	0	0
MY Exp. to the EC	0	0	0	0	0	0
Crush Dom. Consumption	70	70	70	80	80	90
Food Use Dom. Consump.	0	0	0	0	0	0
Feed,Seed,Waste Dm.Cn.	293	293	300	320	305	360
TOTAL Dom. Consumption	363	363	370	400	385	450
Ending Stocks	40	40	20	50	20	50
TOTAL DISTRIBUTION	403	403	390	450	405	500
Calendar Year Imports	353	353	340	387	350	390
Calendar Yr Imp. U.S.	258	258	250	301	240	320
Calendar Year Exports	0	0	0	0	0	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix			
Country	Turkey		
Commodity	Oilseed, Soybean		
Time period	MY2000	Units:	Metric tons
Imports for:			1
U.S.	242587	U.S.	
Others		Others	
Brazil	39139		
Ukraine	3504		
U.A.E.	20		
Total for Others	42663		0
Others not Listed			
Grand Total	285250		0

PSD Table						
Country	Turkey					
Commodity	Meal, Soybean				(1000 MT)(PERC ENT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		9/1999		9/2000		9/2001
Crush	70	70	70	80	80	90
Extr. Rate, 999.9999	0.785714	0.8	0.785714	0.8	0.7875	0.8
Beginning Stocks	40	40	40	40	40	50
Production	55	56	55	64	63	72
MY Imports	492	492	420	450	411	470
MY Imp. from U.S.	326	326	300	280	330	300
MY Imp. from the EC	0	0	0	0	0	0
TOTAL SUPPLY	587	588	515	554	514	592
MY Exports	5	5	6	8	4	10
MY Exp. to the EC	0	0	0	0	0	0
Industrial Dom. Consum	0	0	0	0	0	0
Food Use Dom. Consump.	0	0	0	0	0	0
Feed Waste Dom. Consum	542	543	469	496	500	532
TOTAL Dom. Consumption	542	543	469	496	500	532
Ending Stocks	40	40	40	50	10	50
TOTAL DISTRIBUTION	587	588	515	554	514	592
Calendar Year Imports	520	520	500	539	520	500
Calendar Yr Imp. U.S.	325	325	300	296	320	310
Calendar Year Exports	5	5	5	12	5	15
Calndr Yr Exp. to U.S.	0	0	0	0	0	0

Import Trade Matrix			
Country	Turkey		
Commodity	Meal, Soybean		
Time period	MY2000	Units:	Metric tons
Imports for:			1
U.S.	220,904	U.S.	
Others		Others	
Brazil	113159		
Argentina	54546		
Greece	8214		
Hungry	5000		
France	2583		
Ecuador	2500		
Holland	238		
Total for Others	186240		0
Others not Listed	0		
Grand Total	407144		0

Export Trade Matrix			
Country	Turkey		
Commodity	Meal, Soybean		
Time period	MY2000	Units:	Metric tons
Exports for:			1
U.S.		U.S.	
Others		Others	
N. Cyprus	3909		
S. Cyprus	820		
Turkmenistan	220		
Azerbaijan	68		
Georgia	60		
Total for Others	5077		0
Others not Listed			
Grand Total	5077		0

PSD Table						
Country	Turkey					
Commodity	Oil, Soybean				(1000 MT)(PERC ENT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		10/1999		10/2000		10/2001
Crush	70	70	70	80	80	90
Extr. Rate, 999.9999	0.185714	0.185714	0.185714	0.175	0.1875	0.177778
Beginning Stocks	7	7	5	5	8	5
Production	13	13	13	14	15	16
MY Imports	139	139	130	100	170	120
MY Imp. from U.S.	14	14	15	10	25	20
MY Imp. from the EC	105	105	100	70	115	80
TOTAL SUPPLY	159	159	148	119	193	141
MY Exports	7	7	8	2	9	5
MY Exp. to the EC	0	0	0	0	0	20
Industrial Dom. Consum	19	19	17	20	17	20
Food Use Dom. Consump.	95	95	85	57	125	73
Feed Waste Dom. Consum	33	33	30	35	34	38
TOTAL Dom. Consumption	147	147	132	112	176	131
Ending Stocks	5	5	8	5	8	5
TOTAL DISTRIBUTION	159	159	148	119	193	141
Calendar Year Imports	141	141	160	128	150	140
Calendar Yr Imp. U.S.	8	8	12	8	15	10
Calendar Year Exports	2	2	8	4	9	0
Calndr Yr Exp. to U.S.	0	0	0	0	0	0



Import Trade Matrix			
Country	Turkey		
Commodity	Oil, Soybean		
Time period	MY2000	Units:	
Imports for:			1
U.S.	3779	U.S.	
Others		Others	
Argentina	36465		
Spain	27626		
Holland	4387		
England	3023		
Brazil	2978		
France	2300		
Portugal	2054		
Germany	1902		
Greece	1210		
Belgium	997		
Total for Others	82942		0
Others not Listed	494		
Grand Total	87215		0